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BEM/DWS OPERATIONS MEMO

No: 06-15

DATE: 03/20/2006

FS	☒	**MA**	☒	**SC**	☐
CTS	☐	**CC**	☐	**W-2**	☐
FSET	☐	**EA**	☐	**CF**	☐
JAL	☐	**JC**	☐	**RAP**	☐
WIA	☐	**Other EP**	☐★		

PRIORITY: HIGH

TO: **Income Maintenance Supervisors**
Income Maintenance Lead Workers
Income Maintenance Staff
W-2 Agencies
Workforce Development Boards
Job Center Leads and Managers
Training Staff
Child Care Coordinators

FROM: Amy Mendel-Clemens
Technical Assistance, Training & Education Section
Bureau of Eligibility Management
Division of Health Care Financing

SUBJECT: **Planning for ACCESS "Apply For Benefits" and CWW Mail-In Data Entry Pages**

CROSS REFERENCE: Operations Memos - 04-40, 04-63, 05-38
Administrator's Memo 06-04

EFFECTIVE DATE: ACCESS "Apply For Benefits" Tool and CWW Mail-In Data Entry Pages available – June 5, 2006

PURPOSE

This memo is intended as a planning tool for local agencies. Its purpose is to:

1. Describe the new process for accepting and processing online applications for FoodShare (FS) and Family Medicaid (MA) including BadgerCare (BC) and Family Planning Waiver (FPW) from the ACCESS website. Customers will be able to submit these online applications to local agencies throughout the state starting on June 3, 2006.

2. Describe the optional process for using new CARES Worker Web (CWW) pages to enter data from mail-in applications.

3. Summarize the key choices each agency will need to make while integrating these tools into their business model for accepting and processing applications.

BACKGROUND

In 2003, the Department of Health and Family Services (DHFS) secured a $1.7 million Food Stamp Program Participation grant to develop and implement Internet-based access tools for the FS and MA Programs. This project is designed to increase participation in FS and MA, improve customer service and satisfaction, ease workload for local agencies and improve payment accuracy.

In August 2004, we launched the Am I Eligible? screening tool on www.access.wisconsin.gov (Ops Memos 04-40 and 04-63). In September 2005, we added the Check My Benefits tool to this website (Ops Memo 05-38). To complete this federally funded project, we have developed "Apply For Benefits", an online application for FS and Family MA that will be available statewide starting on June 3, 2006. We are also in the initial design phases of an online tool for recipients to report changes to their worker or change center.

Prior to designing the ACCESS online application, the ACCESS project team met with supervisors and eligibility workers from about 60 local agencies, through regional supervisor meetings and Milwaukee County supervisors meetings, staff meetings with eligibility workers in Washington and Winnebago counties, and a meeting with the Dane County Call/Change Center. During these meetings, we gathered critical information about how to design the online application so that it would meet workers' needs while achieving the goals of the ACCESS project. One key finding was that local agencies wanted flexibility in how they integrate online applications into their business model.

We also heard concerns from workers and supervisors about the completeness of online applications, as well as the potential for payment accuracy problems and fraud. As described below, we have taken steps to address these concerns.

APPLY FOR BENEFITS TOOL DESCRIPTION

Starting on June 3, 2006, low-income residents throughout Wisconsin will have an opportunity to apply for FS and Family MA using an online form available through the ACCESS website (access.wisconsin.gov). This application, which should take 30 to 40 minutes to complete, includes most of the questions that households would be asked during the course of a regular CWW intake interview. Applicants also have the option of setting their filing date with a short version of the ACCESS application.

Sending the ACCESS Application to the Local Agency
Once an applicant has submitted an ACCESS application, it is sent electronically to the local agency in the county or tribe that the applicant has specified. If the applicant chooses the wrong local agency, the application can be easily transferred through CWW to the correct one.

Setting the Filing Date
If an ACCESS application is received by the local agency before 4:30 p.m. on a business day, the filing date will be set for that day. If it is submitted after 4:30 p.m., the filing date will be set for the next business day. If an agency receives an application after 4:30 p.m. and wishes to process the application that day, it may do so; the worker can change the filing date to the current day when the RFA is created.

Managing ACCESS Applications
Each local agency's ACCESS applications can be viewed through a set of new CWW pages that make up the *Local Agency Inbox*. The Inbox pages provide a way for agencies to view, select and/or assign ACCESS applications for worker processing. As described in more detail below, local agencies may also choose to use the Inbox pages to view, select, and/or assign mail-in, walk-in and phone-in RFAs. This option may provide local agencies and workers with a more automated, streamlined way of assigning cases and managing workload.

Once an ACCESS application has reached the Local Agency Inbox, it may be assigned to a worker, or a worker may directly select it for processing from the Inbox. Once an ACCESS application is selected for processing, a worker will review an ACCESS application summary, select the primary person, review basic information, identify potential matches in CWW, and view the RFA summary before starting intake.

Because the client registration pages are completed automatically based on customer data, we have eliminated the requirement for two different workers to create the RFA and confirm the case for an ACCESS application only. However, an agency may still choose to have one worker create the RFA and then reassign the application so that another worker can complete Application Intake and confirm the case.

Population of Data from ACCESS in CWW
Once a worker begins Application Intake, application data provided by the applicant will appear on the appropriate CWW page. On each page, workers will have the option to accept and save the data from the applicant, not save the data, or come back to the data later. This process, which will be described in more detail in the next Operations Memo on ACCESS applications, is designed to allow the worker to review each answer from the ACCESS application before it is saved in CARES. Because the worker doesn't have to key in the data, it should reduce the amount of time it takes for a worker to complete Application Intake. Aside from this data-population feature, the intake and case confirmation steps for ACCESS applications are identical to those of non-ACCESS applications.

KEY POLICY AND PROCESSING ISSUES FOR ACCESS APPLICATIONS

Completeness of Applications
Although federal law prevents us from requiring applicants to provide more than name, address and signature, we believe that ACCESS applications will be sent to local agencies with more complete information than their mail-in counterparts. We have worked with low-income Wisconsin residents and service providers to design the application in a way that makes each question easy to understand. We also emphasize throughout the application that applicants must give us the information requested as a condition of getting benefits. The breadth of questions asked by ACCESS, as well as ACCESS' easy-to-use design, should ensure a high rate of completeness.

Signatures
The requirement for a signature on an application is not changing; however, applicants will be able to sign their application electronically. Under Wisconsin law, an electronic signature may be used in place of a traditional signature. Legally, there is no difference between an electronic signature and a traditional signature.

Interviews
Like MA mail-in applications, ACCESS applications for Family MA will not require an interview. ACCESS applications for FS will require applicants to complete an interview. Under current state and federal policy, FS applicants may receive an exemption from an in-person interview

due to hardship. The ACCESS application will ask applicants about possible hardship situations. If they qualify for an exemption, applicants may complete the interview through a phone call with the worker.

Priority Service
As someone completes the ACCESS application, they will answer a series of questions to help assess whether they are Priority Service (PS) eligible. If the applicant appears to meet the PS requirements, the application will be flagged as PS eligible in the Inbox. The applicant will also get a special message encouraging them to contact the agency as soon as possible. When agencies contact applicants to set up a PS appointment, they always have the option of completing more screening to ensure that the applicant is truly eligible for PS.

Verification
As with traditional applications, applicants will be responsible for submitting necessary verification documents after they apply online through ACCESS. ACCESS will provide an initial list of the items needed based on the applicant's answers, as well as instructions for how to send or bring the documents to the local agency. Agencies will still print and mail a verification checklist for missing items.

Payment Accuracy and Fraud
Although other states with online applications have not encountered problems with increased errors or fraud, DHFS will be conducting reviews of ACCESS applications (with and without face-to-face interviews) to measure any effect on payment accuracy. We will focus this evaluation to identify problems before the end of calendar year 2006 and we will make adjustments as needed.

CARES CHANGES

As described above, each local agency's pending ACCESS applications can be viewed and managed through a set of new CWW pages that make up the Local Agency Inbox. The Inbox pages provide a way for agencies to view, select and/or assign ACCESS applications for processing. Local agencies may also choose to use these Inbox pages to view, select, and/or assign RFAs from mail-in, walk-in and phone-in applications.

Each local agency will have one Inbox. This model preserves the most flexibility for local agencies, and it also makes it easy to ensure coverage when a given worker is absent. All workers may view this Inbox, but there are extensive filtering criteria that allow individual workers, supervisors or offices to view only a subset of the inbox items. The filtering criteria also allow an agency to choose whether to view and manage all RFAs or just those received from ACCESS.

Inbox Set Up Examples

- If a local agency wants to use its Inbox only to manage ACCESS and mail-in RFAs, it could set its Inbox search criteria to only view ACCESS and mail-in RFAs.

- If a local agency with three offices (or units) wanted to use the Inbox to manage all RFAs, one office could set up their inbox view to view and manage all Family MA and FS RFAs. The second office could set up its inbox to view and manage all EBD MA RFAs. The third office could set up its inbox to view and manage all Family Planning Waiver RFAs. In this example, the FPW office would never see FS, Family MA or EBD MA RFAs in its view of the inbox.

- One worker could set up his or her Inbox view to view and manage only ACCESS applications from people whose last name started with letters A-K. Another worker could be responsible for viewing and managing only ACCESS applications from people who prefer to speak Spanish.

The person or persons whom an agency designates to view and manage the Inbox will be responsible for checking the Inbox on a regular basis to ensure that applications from ACCESS are processed in a timely way. As noted above, use of the Inbox to manage non-ACCESS RFAs is optional, but many agencies have indicated that this will give them a more automated process for making assignments to workers.

Selection and Assignment
Once a clerical staff member, worker or supervisor has used the Inbox Search Criteria to view all Inbox items or a certain subset of RFAs in the Inbox, they may choose to either:

- Assign the application/RFA to a worker for later processing, OR

- Directly select an application/RFA and begin processing it using CWW. This is particularly useful for agencies with a “round robin” method of processing applications, since workers can visit the Inbox to select either a specific application or the “next available” application.

Managing and Viewing Assignments
A new feature on each worker’s CWW home page will identify how many RFAs have been assigned to them, and it will provide workers with a quick link to a view of the Inbox that is limited just to their assignments. Agencies that do not want all workers to view or search the Inbox should assign RFAs (rather than having workers select them directly from the Inbox) and then instruct workers to link directly from their home page to the listing of RFAs that have been assigned to them. Once an application is assigned, it can be reassigned to another worker. Once Application Intake starts, the RFA can no longer be viewed in the inbox.

For Inbox management purposes, the Inbox Search Criteria will give agencies a simple count of the number of unassigned RFAs in the inbox. If an ACCESS application remains in the Inbox for more than five days without being assigned, an alert will be sent to the specified supervisor responsible for monitoring the Inbox. If the application is priority service eligible, the alert will be sent after one day. If an ACCESS application is assigned but is not acted upon within 10 days, an alert will be sent to the assigned worker and the worker’s supervisor. If the assigned application is priority service eligible, the alert will be sent after one day.

NEW MAIL-IN DATA ENTRY PAGES

In conjunction with the ACCESS Apply for Benefits project, we have developed a set of new CWW pages that will make it easier for agencies to process data from mail-in MA and FS applications. These new pages, which are available to the worker after the RFA is created, will allow a Client Registration worker or an Eligibility worker to enter data from a mail-in application directly onto pages that have the same data entry fields and look similar to the mail-in application. The entered data would then be made available to the worker through the same process used for populating Application Intake pages with ACCESS data (see above).

While these new data entry pages are optional, we anticipate that they will significantly improve the process of entering data from mail-in applications to CWW. In particular, it may be easier for an agency to designate one clerical worker to do all of the data entry for mail-in applications instead of having eligibility workers completing data entry functions.

Once the data has been entered using the new pages, the RFA with entered data can be viewed in the Inbox. This would allow a CR worker to create the RFA and enter all available data, then assign the application to an eligibility worker or simply leave it for an eligibility worker to select for processing.

KEY CHOICES FOR LOCAL AGENCIES

Each local agency will need to make some key process decisions in order to respond effectively to ACCESS and mail-in applications. We urge you to look at your current business processes to determine if these tools can help ease workload. These tools include:

- Will your agency use the Inbox to view and manage just ACCESS applications, or will it use the Inbox to view and manage all (or some) RFA types for all (or some) program requests? As a reminder, all agencies must to be ready to use the Inbox for ACCESS applications by June 5, 2006, but each agency may choose when and how to use the Inbox for other RFA types.

- When using the Inbox to view ACCESS applications and/or other RFAs, will your agency opt to assign RFAs or have certain workers directly select them for processing, or some combination of both?

- Will your agency use the new CWW mail-in data entry pages to enter data from mail-in applications? If so, who will be responsible for completing this data entry?

- Who specifically will be responsible for checking the Inbox, assigning RFAs, and processing ACCESS applications?

- Based on these decisions, who needs to complete training on these tools? Which specific training component should each worker take?

TRAINING

Training for this initiative will be provided via the DWD/DHFS Learning Center beginning in early May 2006. There will be two tracks of training available: one set of topics for workers who will complete client registration and the mail-in pages, and one set of topics for workers who will perform application intake functions. More information about training will be provided via teleconference (WisLine Web) sessions to be held on April 12, 13 and 17, 2006. These sessions will discuss the details of the training approach and how to determine which training components each worker should take. More information about the April sessions will be provided soon.

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★Program Categories – FS – Food Stamps, MA – Medicaid, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – Food Stamp Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WtW – Welfare to Work, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

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